Section C: Parts of a Case Study

In this section, we will take a closer look at the common components of case study reports and what readers expect to find in them.

What Will I Learn?

By successfully completing this section, you should be able to:

- analyze the purpose and features of the sections of a case study report,
- develop writing and organization strategies for writing each section, and
- examine a case study report for strengths and weaknesses.

Overview

What Do I Need to Include in Each Section?

Each section of the case study report serves a unique purpose and includes key elements. While reports will vary from case to case and course to course, there are some “moves” that you will typically see writers make in each section.

In this part of the guide, we will help you learn what these moves are and how you can make them in your own case study report.

Worksheet: Case Study Report Outline

You were introduced to the **Case Study Report Outline Template** in Section A of this guide. It contains an outline of the major components of a case study report that you can consider using as a template when completing case study reports. If you haven’t already, it is recommended that you download the template now.

Case Study Report Outline Template

This outline sample of a **Case Study Report** should serve as a useful guide to help you get started.

Download PDF

Download the Case Study Report Outline Template (PDF).

Tip: The components of a case study report will vary depending on the preferences of your institution and instructor. Be sure to refer to your assignment instructions in order to find out exactly what will be required when it comes to sections as well as formatting requirements for your report.

The Executive Summary

What Is the Purpose of An Executive Summary?

An executive summary typically provides a one-page snapshot of the entire report, focusing on the main highlights. It is usually included at the start of a case report before the main text. Depending on the preferences of your instructor and institution, the executive summary can be written in either paragraph- or point-form.

What Should Be Included in an Executive Summary?

The executive summary of a case study report should include the following:

Problem Statement

Tell readers in 1–2 sentences what the issue at hand is.

Example: The main problem facing Company XYZ is that sales are declining and employee morale is low. Without addressing these concerns, Company XYZ will be in serious trouble and may not be able to regain their standing as an industry leader.

Recommendation

What should be done to address the problem?

Example: In order to solve this problem it is recommended that Company XYZ undergo a change in strategy, structure, and culture. Specifically, it is recommended that Company XYZ

- pursue a strategy that places a high level of importance on innovation;
- restructure the organization so that it is flexible, innovative, and appropriate for the size of the organization; and
- begin to reshape the company's organizational culture and the way in which day-to-day business is conducted; managers at all levels of Company XYZ will need to emphasize the values of ethics, creativity, and trust.

Supporting Arguments and Evidence

Summary of all of the major sections of your report, highlighting the arguments and evidence that support your recommendation.

Conclusion

What is the key message you want readers to take away? Why is it important to solve this problem and what do you anticipate the outcomes will be if the recommendations are followed?

Tip: Keep these arguments in the same order they appear in the main text.

What Tips and Strategies Can I Employ to Write the Executive Summary?

The following is a list of tips and strategies for writing the executive summary section of a case study report:

- Write the executive summary after all of the other sections of the report have been written.
- Consider your role. Write from the perspective that you are asked to adopt; for example, did the case instructions ask you to assume the role of an internal organizational member? An external organizational consultant? Some other stakeholder? How will this influence the tone and content of the summary?
- Avoid repeating case facts in detail. There can be a more general, summative opening sentence but the remainder of your executive summary should focus on going beyond the case information that was provided.
- Clearly state and justify the specific recommendation that will solve the problem that is being encountered. Imagine a skeptical audience: Why should they believe you?
- Include only key financial numbers and associated costing information.
- Make the executive summary can stand alone. Readers should be able to understand the Executive Summary even if they don't read the rest of the report.

Example: Annotated Case Study Report

Learn more about writing strategies for **The Executive Summary** section of your paper.

Interactive Activity
Launch the Executive Summary (Interactive Version) annotated example that you can review in your browser.

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Download the Executive Summary (PDF) section of the complete Case Study Report (PDF) annotated example that you can review and print.

The Introduction

What Is the Purpose of the Introduction?

The introduction should briefly introduce the report to the reader and should then clearly, succinctly, and accurately identify the main problem being faced by the key decision-maker.

What Should Be Included in an Introduction?

The introduction of a case study report should include the following:

1. Introductory sentence
2. Problem statement
3. Details about the problem (stick to details that relate to your recommendation)
    a. Who are the most important decision-makers? Stakeholders?
    b. What are the most important issues?
    c. Why is this problem occurring? What are the root causes? Underlying factors?
    d. When does this decision need to be made by? What is the decision timeline? Due date?
4. Recommendation: “It is recommended in the current report that [Company XYZ] pursue [this course of action] to address [these issues].”
5. Outline or road map of the remainder of the report

What Tips and Strategies Can I Employ to Write the Introduction?

The following is a list of tips and strategies for writing the introduction section of a case study report:

- Avoid repeating case facts in detail and unnecessarily summarizing case facts that are already familiar to the reader.
- State the main problem up front—be as specific and simple as possible.
- Create a sense of urgency and importance associated with the situation by identifying the key stakeholders, problems, underlying factors, and timeline issues. Engage the reader by explaining the tension and complexity underlying the situation.
- State your recommendation so that the reader can consider the rest of your report based on the solution being proposed; this will help to provide context for your analysis and other major report sections.

- Remember: There should be no surprises when the reader gets to the actual recommendation section.

Example: Annotated Case Study Report

Learn more about writing strategies for the **Introduction** section of your paper.

Interactive Activity
Launch the Introduction (Interactive Version) annotated example that you can review in your browser.

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Analysis

What Is the Purpose of An Analysis Section?

The analysis section of your case study report is likely to be a very substantial part of your report. In this section you will examine the problem that you identified in the preceding section through a systematic and thorough application of your course and program content.

What Should Be Included?

The analysis section of a case study report should include the following:

1. Application of course and/or program content to: examine the problem being faced, and to prepare the reader for the justification and specifics of your Recommendation, Implementation Plan

2. References to related exhibits, which are appendices that appear at the end of the report in order to provide further elaboration or evidence regarding your analysis (e.g., graphs, figures, tables, financial documents)

How Should the Analysis Be Structured?

Be sure to check with your instructor to verify whether there is a specific format (e.g., SWOT, PEST) that should be followed. If no format is given, here are some general guidelines:

1. Begin with an examination of the problem, highlighting the most important parts. Avoid including unnecessary detail—focus only on the problem and its parts.

2. Apply course concepts or theories to the problem to provide insight into causes and effects, using headings to identify each section.

3. Conclude with a summary of what your analysis has revealed. Think of this final section as an answer to the question “So what?”

What Tips and Strategies Can I Employ to Write the Analysis Section?

The following is a list of tips and strategies for writing the analysis section of a case study report:

- Use headings to subdivide the section.
- Show your understanding of the course and/or program content by systematically applying what you have been learning to the specific problem.
- Avoid using academic jargon. Instead, explain the concepts in your own words while referencing key sources.
- Only include information that is directly relevant to the problem at hand. Avoid including course and program content that does not relate to the problem that you identified in the

preceding section.

- Be sure to discuss course and program concepts that will have an impact on your recommendation and implementation plan.
- Use exhibits strategically to elaborate on ideas in the report; however, ensure that the exhibits expand on ideas you've already discussed. Avoid introducing exhibits that don't tie into the main text.

Example: Annotated Case Study Report

Learn more about writing strategies for the **Analysis** section of your paper.

Interactive Activity

Launch the Analysis (Interactive Version) annotated example that you can review in your browser.

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Alternatives and Decision Criteria

What Is the Purpose of An Alternatives and Decision Criteria Section?

This section helps decision-makers consider all the possible ways they could address the problem by:

1. Presenting all viable, mutually exclusive solutions to the problem.
2. Outlining the criteria that will be systematically applied to determine the best solution to the problem.

What Are “Mutually Exclusive” Alternatives?

Alternatives are mutually exclusive if choosing one alternative rules out the others. Using mutually exclusive alternatives prevents a situation in which an organization has to implement multiple alternatives.

What Are “Decision Criteria”?

Key requirements that the recommendation will need to meet to successfully solve the problem.

What Should Be Included?

The alternatives and decision criteria section of a case study report should include the following:

1. All viable, mutually exclusive alternatives
2. Decision criteria including:
    a. Ranking of importance in terms of which decision criterion is the most important factor in order to be confident that the recommendation will solve the problem, second most important, etc.*
    b. Weighting in terms of how important each of the decision criteria are in order to be confident that the recommendation will solve the problem.*
    c. *Not all instructors or institutions will require ranking and weighting information as it is mostly determined in a subjective manner based on your analysis of the problem; nevertheless, it may assist in helping you to decide in a more systematic manner between two or more viable alternatives.

What Tips and Strategies Can I Employ to Write the Alternatives and Decision Section?

The following is a list of tips and strategies for writing the alternatives and decision section of a case study report:

- Your instructor may make the alternatives section of a case study report optional; however, if you can think of at least one reasonable and viable alternative in addition to your recommendation, then this section should be included.
- Be sure to list all reasonable and viable alternatives (including your recommendation).
- Ensure that the alternatives listed are mutually exclusive.
- In the decision criteria section, include the criteria that will be most effective for evaluating the alternative solutions to the problem being faced.
- For a more systematic application of the decision criteria, assign importance and weighting to your decision criteria factors and then apply them to each of the alternatives.
- Be sure to convincingly demonstrate that your recommendation is in fact the best choice compared with the other alternatives. Be explicit about how the criteria apply to the recommendations—do not assume that the reader will see the connection.

Example: Annotated Case Study Report

Learn more about writing strategies for the **Alternatives and Decision Criteria** section of your paper.

Interactive Activity

Launch the Alternatives and Decision Criteria (Interactive Version) annotated example that you can review in your browser.

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Recommendations and Implementation Plan

What Is the Purpose of the Recommendations and Implementation Plan Section?

Although the reader will by now be well aware of your recommendation, in this section you will discuss all of the specifics of the recommendation for solving the problem. Moreover, you should also present a thorough and well thought-out implementation plan for executing the recommendation and ensuring its success.

What Should Be Included?

The recommendations and implementation plan section of a case study report should include the following:

1. Detailed explanation of what your recommendation entails. What is it that will be done? What specific steps will be involved? What equipment or expertise will be needed?

2. Explanation of your implementation plan, including:

   - Who will be responsible for what part of the implementation plan?
   - When will the different parts of the recommendation be implemented? Short-, medium-, and long-term implementation plan?
   - What will the cost be of these required actions?
   - What will the impact of this recommendation be on other parts of the organization?
   - What could go wrong, and what contingency plans are in place?

What Tips and Strategies Can I Employ to Write the Recommendations and Implementation Plan?

The following is a list of tips and strategies for writing the recommendations and implementation plan of a case study report:

- Be sure to include all of the details of your recommendation. You have already outlined your more general recommendation to the reader earlier in your report but now is your opportunity to provide the more specific details regarding your recommendation.
- Include a well thought-out implementation plan that includes all of the specifics that an organization would actually require in order to realistically implement your recommendation. Try to put yourself in the mindset of the organizational members responsible for implementing your recommendation; what step-by-step specifics will they need to be aware of in order to take your recommendation and ensure that it is successfully implemented?
- Including a contingency analysis of the possible problems that could arise from your recommendation. What might go wrong? How will you address these problems should

they come up in order to still be able to successfully implement your recommendation?

- Also be sure to consider the expected as well as the potentially unexpected impact of your recommendation on the people within the organization.
- A good strategy would be to explain how the organizational leaders will evaluate whether your implementation plan has been successful and whether the recommendation has achieved the desired results. Be specific regarding the evaluation metrics that should be used (e.g., measures of customer satisfaction, measures of employee engagement, profitability analyses)

Example: Annotated Case Study Report

Learn more about writing strategies for the **Recommendations and Implementation Plan** section of your paper.

Interactive Activity

Launch the Recommendations and Implementation Plan (Interactive Version) annotated example that you can review in your browser.

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Download the Recommendations and Implementation Plan (PDF) section of the complete Case Study Report (PDF) annotated example that you can review and print.

Conclusion and References

What Is the Purpose of the Conclusion?

The purpose of the conclusion section is to leave your reader with one or two last, powerful statements that will help to reinforce the recommendation that you are proposing.

Some instructors and institutions do not require a conclusion section, but if done effectively, it can end your case report on a strong note.

What Should Be Included?

The conclusion section of a case study report should include the following:

1. A summary sentence that explains what we have learned from the report
2. One or two impactful and memorable statements to conclude your report (what is the most important thing that the organization should take away from the report?)

What Tips and Strategies Can I Employ to Write the Conclusion?

The following is a list of tips and strategies for writing the conclusion of a case study report:

- Avoid an abrupt ending to your written case report. Provide a few sentences to help draw things to a natural close.
- Persuasively summarize how your recommendation will solve the problem at hand.
- Ensure that you yourself are persuaded and convinced by the concluding statement; for example, would you believe that this solution will work if you were the person reading your report?

Example: Annotated Case Study Report

Learn more about writing strategies for the **Conclusion and References** section of your paper.

Interactive Activity
Launch the Conclusion and References (Interactive Version) annotated example that you can review in your browser.

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Download the Conclusion and References (PDF) section of the complete Case Study Report (PDF) annotated example that you can review and print.

Citing Your Sources

What Sources Should You Cite?

You should use in-text citations for any idea that is not your own. Moreover, these citations should be reflected in your references list, which you will be required to provide at the end of your case study report. Your institution will have their own plagiarism and academic misconduct policies, which you should familiarize yourself with; however, a best practice will be to be cautious and ensure that all of the following are appropriately cited and referenced throughout your work:

- Ideas from sources other than your own thinking
- Direct quotations, which you should use infrequently in your case study reports
- Paraphrasing and/or summarizing the work of others
- Course and/or program specific definitions, theories, models, etc.
- Information from popular press articles
- Data, financial documents, etc. from annual reports, company webpages

What Are the Common Citation Styles?

It is likely that your instructor will let you know what his/her preferences are in terms of a citation style; however, some of the most common citation styles include:

- American Psychological Association (APA)
- Chicago Manual of Style (Chicago)
- Modern Language Association (MLA)

Key Takeaways and References

Key Takeaways

Now that you've completed this section, keep the following things in mind:

- The key to most case study reports is logic. There is usually not just one desired correct response to a case study, but rather, there are more and less logical, practical, and reasonable responses. Incorporating sound and strong logic throughout your report is paramount.
- Ensure that your report is written at a level that would appeal to a business audience rather than an academic one.
- Lastly, can you confidently stand behind, advocate for, and answer questions regarding your case response? If so, then your work is likely in a good position!
- The next steps for this set of modules will involve helping you to take all of the work that has gone into your written report in order to prepare a verbal presentation of your work.

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Next Section Overview

In Section D: Reviewing and Presenting , we will explore understanding and meeting your instructor's expectations for the report and presentation.

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